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## Infrastructure for Integration in Structural Sciences

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Data Infrastructure Challenges: working across  
scale, disciplinary and institutional boundaries

University of Leicester

5<sup>th</sup> May 2011



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# Outline

- I2S2 Project overview & aims
- Project Team
- Research data & infrastructure
- Requirements analysis
- A Scientific Research Activity Lifecycle Model
- An integrated services approach
- Testing the I2S2 information model
- Cost-Benefits analysis



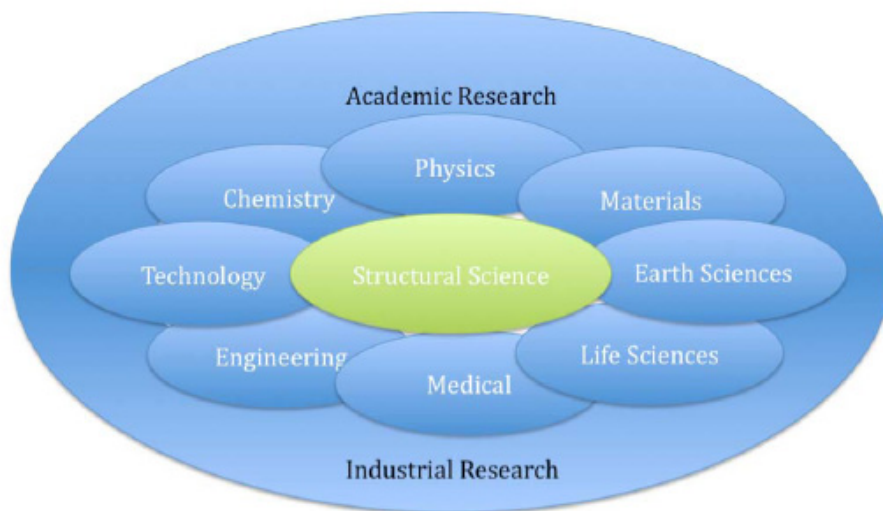
Diamond Light Source (DLS),  
Science & Technology Facilities Council, UK



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# Overview & Aims

- Research Data Management Infrastructure strand of the JISC's Managing Research Data Programme (18 month project, Oct 2009 - March 2011)
- Understand and **identify requirements for a data-driven research infrastructure** in the Structural Sciences
  - Examine localised data management practices
  - Investigate data management infrastructure in large centralised facilities
- Show how effective cross-institutional research data management can **increase efficiency and improve the quality of research**





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# Project Team

- Liz Lyon (Project Director, UKOLN (University of Bath) & Digital Curation Centre)
- Manjula Patel (Project Manager, UKOLN (University of Bath) & Digital Curation Centre)
- Sarah Hext (Financial Administrator, UKOLN (University of Bath))
- Simon Coles (EPSRC National Crystallography Centre, University of Southampton)
- Neil Beagrie (Charles Beagrie Ltd.)
- Brian Matthews (Science & Technology Facilities Council)
- Erica Yang (Science & Technology Facilities Council – now at Bodleian libraries, University of Oxford)
- Martin Dove (Earth Sciences, University of Cambridge)
- Peter Murray-Rust (Chemistry, University of Cambridge)
  
- Simon Hodson (JISC Managing Research Data Programme Manager)

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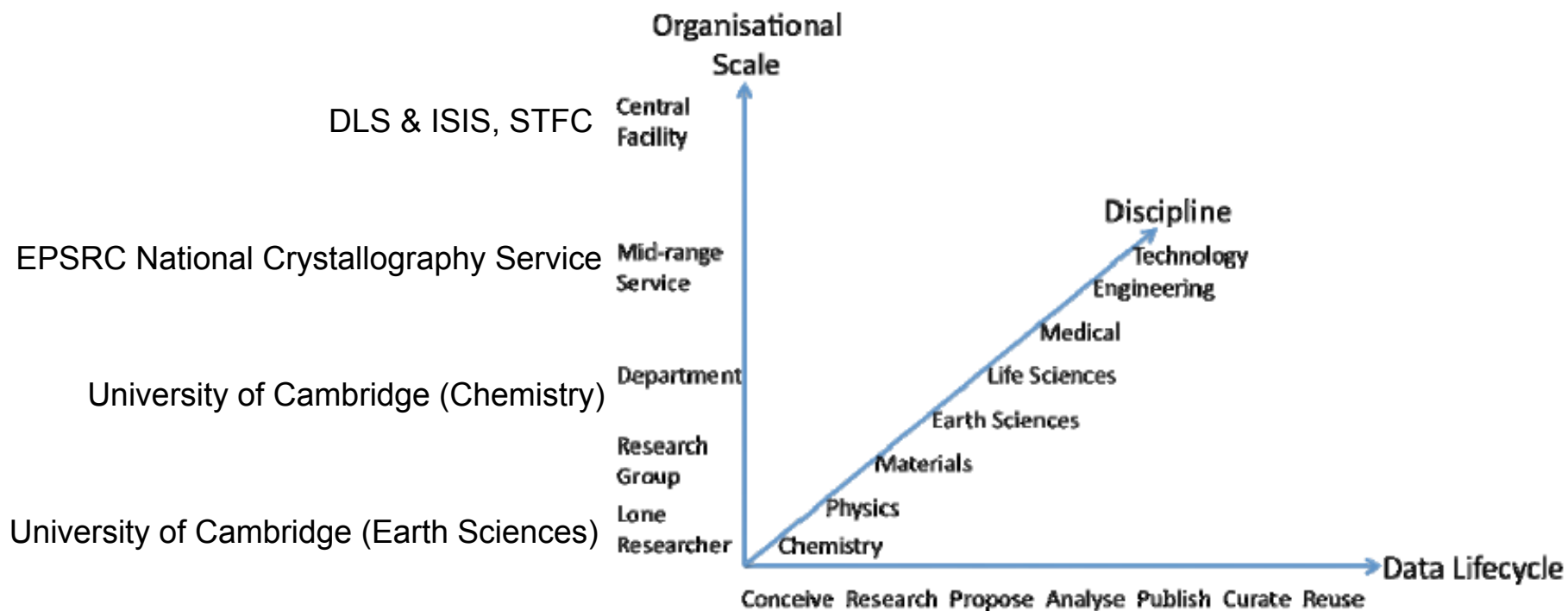
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# Overall Methodology

**Scale and complexity:** small laboratory to institutional installation to large scale facilities e.g. DLS & ISIS, STFC

**Interdisciplinary issues:** research across domain boundaries

**Data lifecycle:** data flows and data transformations over time





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# Research Data & Infrastructure

- **Research Data** includes (all information relating to a physical experiment):
  - raw, reduced, derived and results data
  - research and experiment proposals
  - results of the peer-review process
  - laboratory notebooks
  - equipment configuration and calibration data
  - wikis and blogs
  - metadata (context, provenance etc.)
  - documentation for interpretation and understanding (semantics)
  - administrative and safety data
  - processing software and control parameters
- **Infrastructure** includes physical, technical, informational and human resources essential for researchers to undertake high-quality research:
  - Tools, Instrumentation, Computer systems and platforms, Software, Communication networks
  - Documentation and metadata
  - Technical support (both human and automated)
- Effective **validation, reuse and repurposing of data** requires
  - Trust and a thorough understanding of the data
  - Transparent contextual and provenance information detailing how the data were generated, processed, analysed and managed



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# Earth Sciences, Cambridge

- Construct large scale atomic models of matter that best match experimental data; using Reverse Monte-Carlo Simulation techniques
- Experiment and data collection conducted at ISIS Neutron Source (GEM)
- **Little or no shared infrastructure**
  - Data sharing with colleagues via email, ftp, memory stick etc.
  - Data received from ISIS is currently stored on laptops or WebDAV server
- **Management of intermediate, derived and results data a major issue**
  - Data managed by individual researcher on own laptop
  - No departmental or central institutional facility
- Data management needs largely so that
  - Data can be **shared internally**
  - A researcher (or another team member) can return to and **validate results in the future**
  - External collaborators can **access and use the data**
- Any changes should be embedded into scientist's workflow and be **non-intrusive**

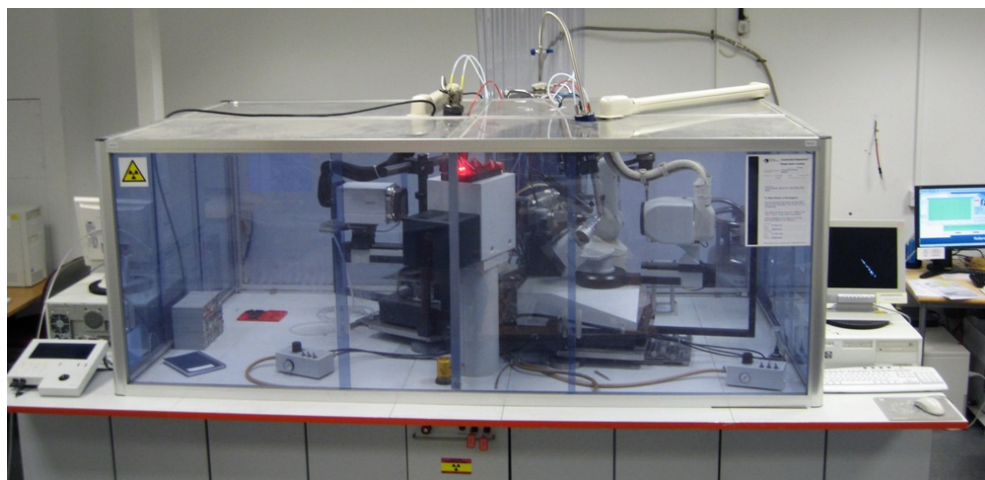




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# Chemistry, Cambridge

- Implementation and enhancement of a pilot repository for crystallography data underway (CLARION Project)
- Need for **IPR, embargo and access control** to facilitate the controlled release of scientific research data
- Information in **laboratory notebooks need to be shared** (ELN)
- Importance of **data formats and encodings** (RDF, CML) to maximise potential for data reuse and repurposing



EPSRC National Crystallography Service,  
University of Southampton, UK



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# EPSRC NCS, Southampton

- **Service provision function** (operates nationally across institutions)
  - Local x-ray diffraction instruments + use of DLS (beamline I19)
  - Retain experiment data
  - Maintain administrative data
- Raw data generated in-house is stored at ATLAS Data Store (STFC)
- Local **institutional repository (eCrystals)** for intermediate, derived and results data
  - Metadata application profile
  - Public and private parts (embargo system)
  - Digital Object Identifier, InChi
- Experiments conducted and data collected by NCS scientists either in-house or at DLS
- **Labour-intensive paper-based administration and records-keeping**
  - Paper-based system for scheduling experiments
  - Paper copies of Experiment Risk Assessment (ERA) get annotated by scientist and photocopied several times
  - **Several identifiers** per sample
- **Administrative functions require streamlining between NCS and DLS**
  - e.g. standardisation of ERA forms, identifiers



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# DLS & ISIS, STFC

- Operate on behalf of **multiple institutions and communities**
- Scientific (peer) and technical **review of proposals** for beam time allocation
- User offices manage **administrative and safety information**
- Service function implies an obligation to retain raw data
- Large infrastructure, engineered to **manage raw data**
  - Designed to describe facilities based experiments in Structural Science e.g. ISIS Neutron Source, Diamond Light Source.
  - ICAT implementation of Core Scientific Metadata Model (CSMD)
- **No storage or management of derived and results data**
  - Derived data taken off site on laptops, removable drives etc.
  - Results data independently worked up by individual researchers
- Experiment/Sample **identifiers based on beam line number**

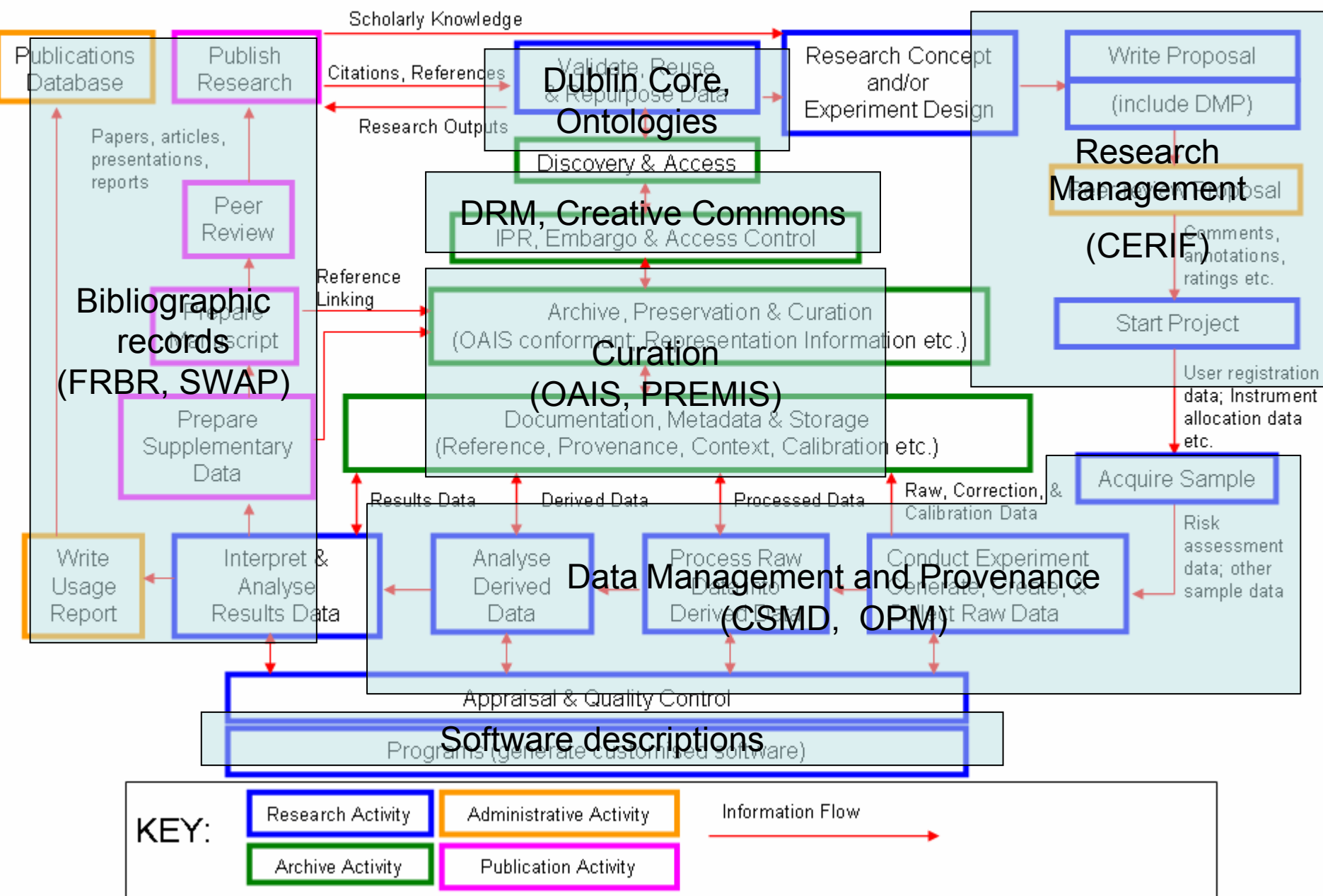


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# Generalised Issues

- Basic requirement for robust **data storage and backup** facilities to sophisticated needs such as **structuring and linking** together of data
- **Management of intermediate, derived and results data a major issue**
- **Contextual information is not routinely captured**
- Processing pipeline is dependent on a **suite of software**
- The actual **workflow or processing pipeline is not routinely recorded**
- Need for adequate **metadata and contextual information** to support:
  - Maintenance and management; Linking together of all data associated with an experiment; Referencing and citation; Authenticity; Integrity; Provenance; Discovery, Search and retrieval; Curation and preservation; IPR, embargo and access management; Interoperability and data exchange
- Simplification of inter-organisational communications and **tracking, referencing and citation of datasets**
  - Unique persistent identifiers
  - Standardised Experiment Risk Assessment forms
- Solutions should be as **non-intrusive** as possible

# An Idealised Scientific Research Activity Lifecycle Model

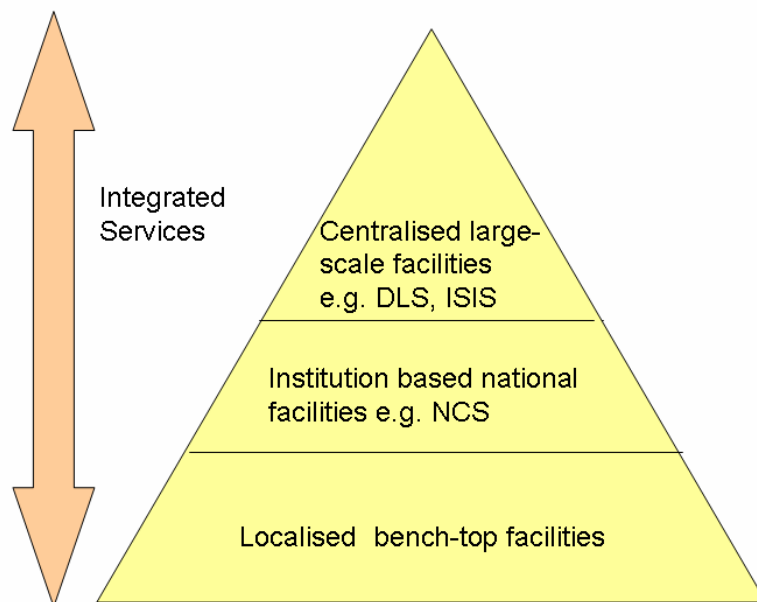




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# An Integrated Service Approach

- Individual researcher, group, department, institution, facilities all **working within their own frameworks**
- Merit in adopting an **integrated framework** which caters for all scales of scientific research
- Researchers need to be able to manage their data **across institutional and domain boundaries in a seamless manner**





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# I2S2 Integrated Information Model

- Core Scientific Metadata Model (CSMD)
  - Designed to describe **facilities based experiments** in Structural Sciences
  - Forms a **basis for extension to**: Laboratory based science; Derived data; Secondary analysis data; Preservation information; Publication data
  - Aim to cater for the **scientist's research lifecycle** as well as facilities data
- oreChem Model
  - An abstract model for **planning** and **enacting** chemistry experiments
  - Enables exact **replication of methodology** in a machine-readable form
  - Allows rigorous **verification of reported results**
- I2S2-IM = CSMD-Core + oreChem Model
  - Underpins **distributed data management**
  - Effective **inter-disciplinary data sharing**
- I2S2-IM being implemented at STFC in the form of **ICAT-Lite**
  - A **personal workbench** for managing data flows
  - Allows the user to **“commit data” for long-term storage**
  - Enables capture of **provenance** information



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# Testing the I2S2-IM

## Case study 1: Scale and Complexity

- Data management issues **spanning organisational boundaries** in Chemistry
- **Interactions** between a lone worker or research group, the EPSRC NCS and DLS
- Traversing **administrative boundaries** between institutions and experiment service facilities
- Aim to probe both **cross-institutional and scale** issues

## Case Study 2: Disciplinary issues

- Collaborative group of scientists (university and central facility researchers) in Earth Sciences
- Use of ISIS neutron facility and subsequent **modelling of structures** based on raw data
- Identification of **infrastructure components and workflow modelling**
- Aim to explore the **role of XML for data representation** to support easier sharing of information content and derived data





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# Cost-Benefits Analysis

- A **cost-benefit analysis** using the Keeping Research Data Safe (KRDS) model
- **Extending the KRDS Model**
  - Focus has been on extensions and elaboration of activities in the research phase (KRDS “pre-Archive” stage)
- **Metrics and assigning costs**
  - Identification of activities in research activity lifecycle model that will represent significant cost savings or benefits
  - Identification of non-cost benefits and possible metrics
- 2 use case studies
  - **Quantitative** - cost-benefits in terms of service efficiencies (NCS)
  - **Qualitative** - researcher benefits (improvement in tools; ease of making data accessible etc.)



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# Conclusions

- Considerable variation in data management requirements across differing scales of science
- I2S2 Integrated framework aims to:
  - Support the scientific research activity lifecycle model
  - Capture processes and provenance information
  - Streamline flow of metadata, administrative information and experiment data across organisations
  - Interoperate with and complement existing models and frameworks
- Cost-benefits analysis to assess impact of interventions



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# Acknowledgements

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